

Committed to a fair and equitable property tax system for Hoosier taxpayers.

Indiana Gateway for Government Units What's New for 2012-2013

Eric Bussis and Colby Shank

March 14 and 22, 2012

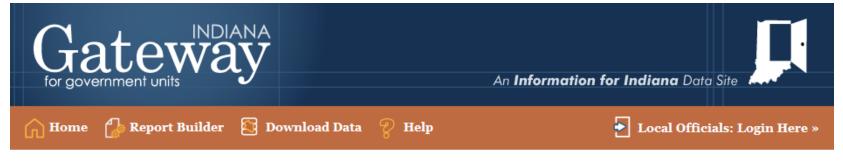


Overview of the Gateway Project

- Phase I: Non-school budgets
- Phase II: State Board of Accounts annual report,
 DLGF debt report
- Phase III: School budgets
- Goal: Transparency and Education via Public Access Site: https://gateway.ifionline.org
 - local financial information made accessible and understandable to the public



Gateway Public Access Website



Where do my tax dollars go?

type your address





Explore my government's finances

This site contains budget, expense and debt data for counties, cities/towns, townships, special districts and more (school districts available in 2012).

- · Browse unit reports
- Download data
- Learn more about the budget process

2012 Budgeted Expenditures

\$8,615,558,270 (96.2% of units reporting)

Local Debt Remaining Balance

\$13,531,673,077

(58.3% of units reporting)

About the Gateway • Contact Us • Contact Officials

The Indiana Gateway for Government Units was developed and is maintained by Indiana University's Indiana Business Research Center, part of the Kelley School of Business. This public portal provides access to local government financial and tax data that has been entered by local units themselves. We work in partnership with the Department of Local Government Finance and the State Board of Accounts.





Timeline for 2012

- March 1: Deadline to Report all Outstanding Debt through Gateway Debt Management
- April 1: Release the 2013 Budget Package
- Summer
 - Release upgraded Debt Management application
 - Launch Appeals form for 2013 max levy appeals
 - Launch Additional Appropriations, for use during CY 2013
 - Launch Sales Disclosure Application in Gateway for Assessors and the public



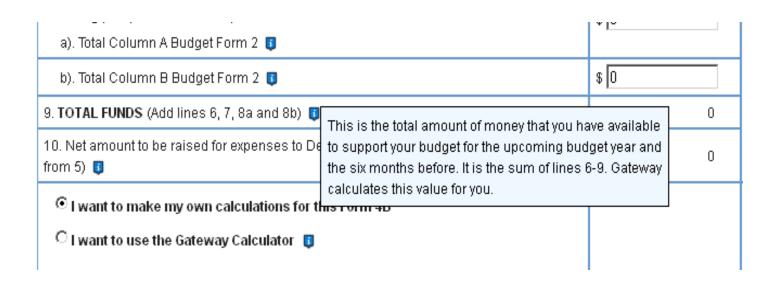
2013 Budget Forms – Policy Changes

- Form 144: no longer in Gateway
 - Follow SBOA manual for salary ordinance forms and procedures
- Form 3: Submit at same time form is given to newspaper
 - This allows us to publish the information online
- Revenue/Receipt Codes: New DLGF-SBOA List
 - Consistent categorization and grouping as Annual Financial Report
 - Shorter, more manageable list



2013 Upgrades – Information Pop-ups

- Throughout website, hover over the icon to get more information about budget forms or website functionality.
- Example on Form 4b:





2013 Upgrades – Customize Revenue

- Under "Customize Unit" users can now select "Customize Revenues"
 - Set up revenue sources from drop-down menus
 - Link revenue to specific fund(s)
- Once revenue is customized, Form 2 is ready for entry
 - Revenue codes, names, already on fund-specific forms
 - Only need to enter the amounts
- Getting Started
 - Any revenue included on Form 2 last year will roll into "Customize Revenue" EXCEPT those with multiple replacement options for the new list and those entered with missing or incorrect revenue codes last year
 - Units should review and refine the information that prepopulates "Customize Revenue" screens



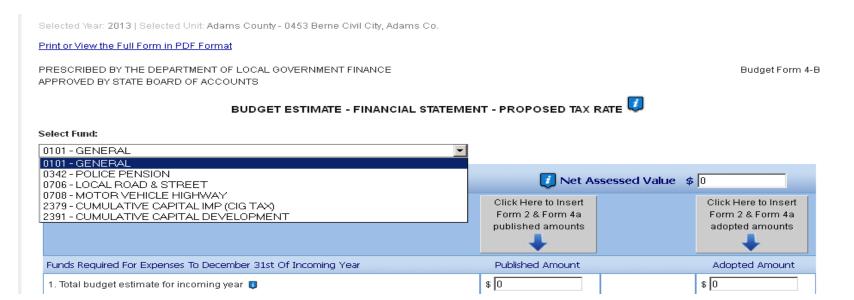
2013 Upgrades – Fund/Dept Selection

• In 2012:

- Forms 1, 2, 4B guided users through "selection screens" to pick funds and departments
- Form 4a had users pick funds and departments from drop-down menus on the same screen

In 2013

 All forms will follow the drop-down method for fund and department selection





2013 Upgrades – Forms 1 and 2

- Now use a common template unit type/fund specific line items and categories removed
- New look and feel
 - Easier data entry
 - Resolve issues with Internet Explorer, time lags
- More convenient printing
 - "Printer-friendly" version like other 2012 forms (e.g., Form 4a)
 - Only print line items you enter no blank spaces, fewer pages
- Form 1 line item codes and descriptions entered in 2012 roll over to 2013
- Form 2 revenue codes and descriptions roll from the "customize revenue" area



Form 1 Snapshot

Select Unit > Unit Main Menu > Budget Form Menu > Form 1	
Selected Year: 2013 Selected Unit: Greene County - 0000 Greene County	
Click Here to Print This Form	
Prescribed by Department of Local Government Finance Approved by State Board of Accounts	Budget Form No. 1
BUDGET ESTIMATE FOR	
Select Fund:	
0101 - GENERAL	
Select Department:	
0002 COUNTY AUDITOR	

Select Category Tab





Form 2 Snapshot

Select Unit > Unit Main Menu > Budget Form Menu > Form 2

Selected Year: 2013 | Selected Unit: Greene County - 0000 Greene County

Click Here to Print This Form

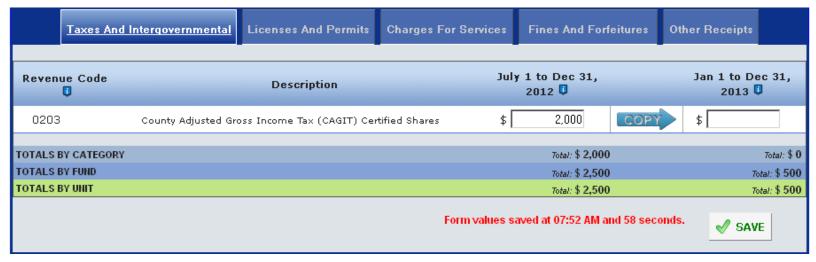
Prescribed by Department of Local Government Finance Approved by State Board of Accounts Budget Form No. 2

ESTIMATE OF MISCELLANEOUS REVENUES FROM SOURCES OTHER THAN GENERAL PROPERTY TAXES FOR USE IN PREPARATION OF ESTIMATE OF FUNDS TO BE RAISED, YEAR 2013

Select Fund:

0101 - GENERAL	•
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Select Category Tab





2013 Upgrades – Form 3

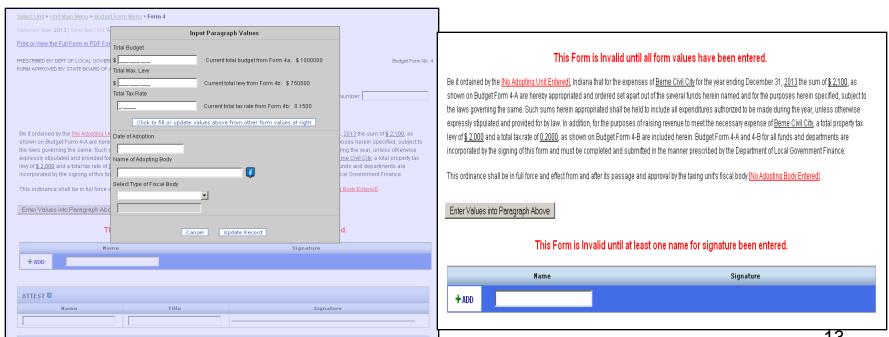
- Previous year levy now pre-populated correctly for cross-county units
- "Fill" from other forms optional, user can also edit/type in the values
- Ability to specify an adopting body different from the unit (e.g., solid waste mgmt district adopted by county council)

1 Fund Name	2 Budget Estimate	3 Maximum Estimated Funds to be Raised (Including appeals and levies exempt from maximum levy limitations)	4 Excessive Levy Appeals (Included in Column 3)
	Click Here to Insert Form 4b published amounts	Click Here to Insert Form 4b published amounts	
0101-GENERAL	\$ 0	\$ 0	\$ 0
0342-POLICE PENSION	\$ 0	\$ 0	\$ 0



2013 Upgrades – Form 4

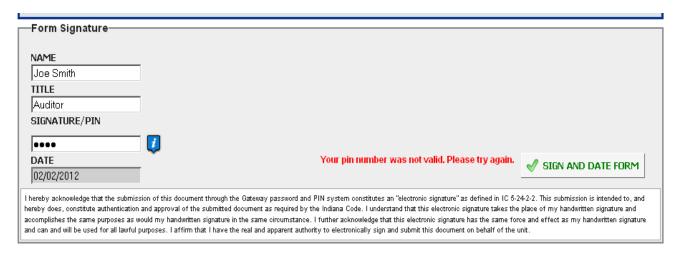
- Ability to directly enter the total budget, tax rate, and levy (instead of pulling from other forms)
- User must enter total budget, tax rate, and levy before printing form; additional warnings added for invalid forms





2013 Upgrades – Signature Panel

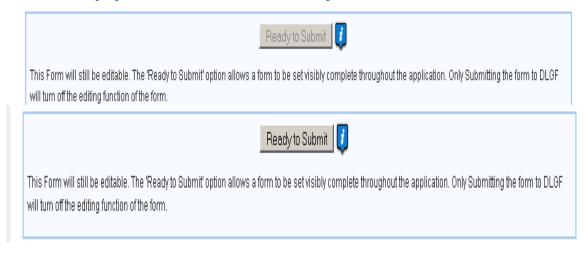
- Only one signature panel per <u>set</u> of forms
 - E.g., sign only once for all Form 1s
- Automated PIN Code checking
 - Error will occur if user enters incorrect PIN
- Automatic date population
 - Date is inserted when user clicks "sign and date form"





2013 Upgrades – Validation

- "Ready to Submit" button cannot be clicked until:
 - At least one value has been saved to each column of the form (Forms 1, 2, 4a, 4b)
 - Critical values have been entered and saved (Forms 3, 4)
 - Signature panel is completed and "sign and date form" has been checked
- Button shows as "grayed out" until form meets criteria, appears normally after





New Budget Forms Added to Gateway

- Current Year Financial Worksheet
 - Formerly known as the Line 2 Worksheet
 - Data flows to Form 4B
- Debt Worksheet
 - Imports data from Gateway Debt Management
 - Debts need to be entered in Gateway Debt
 Management first



Additional Functionality

- Appeals and Additional Appropriations
 - Under development
 - Expected to launch this summer
- Form 22
 - Under development
 - Expected to launch for pilot phase in December
 - Looking for development group members

Contact the Department

- Eric Bussis
 - Telephone: 317.232.3759
 - E-mail: <u>erbussis@dlgf.in.gov</u>
- Colby Shank
 - Telephone: 317.234.4480
 - E-mail: <u>cshank@dlgf.in.gov</u>
- Gateway Mailbox: gateway@dlgf.in.gov
- Web site: www.in.gov/dlgf
 - "Contact Us": www.in.gov/dlgf/2338.htm.